HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Atlantic

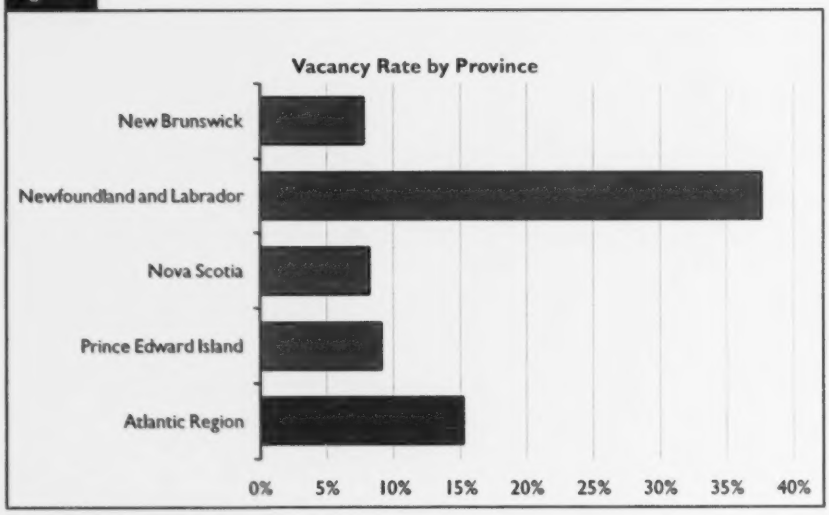
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2011

Highlights

- The overall vacancy rate for standard spaces in retirement homes in Atlantic Canada was 15.2 per cent in 2011, up from 10.7 per cent a year earlier.
- There were 164 retirement home structures surveyed containing a total of 7,124 spaces and housing 6,558 residents.
- The overall average rent for a standard retirement home space was $1,921 in the Atlantic Region.

Figure 1



Source: CMHC

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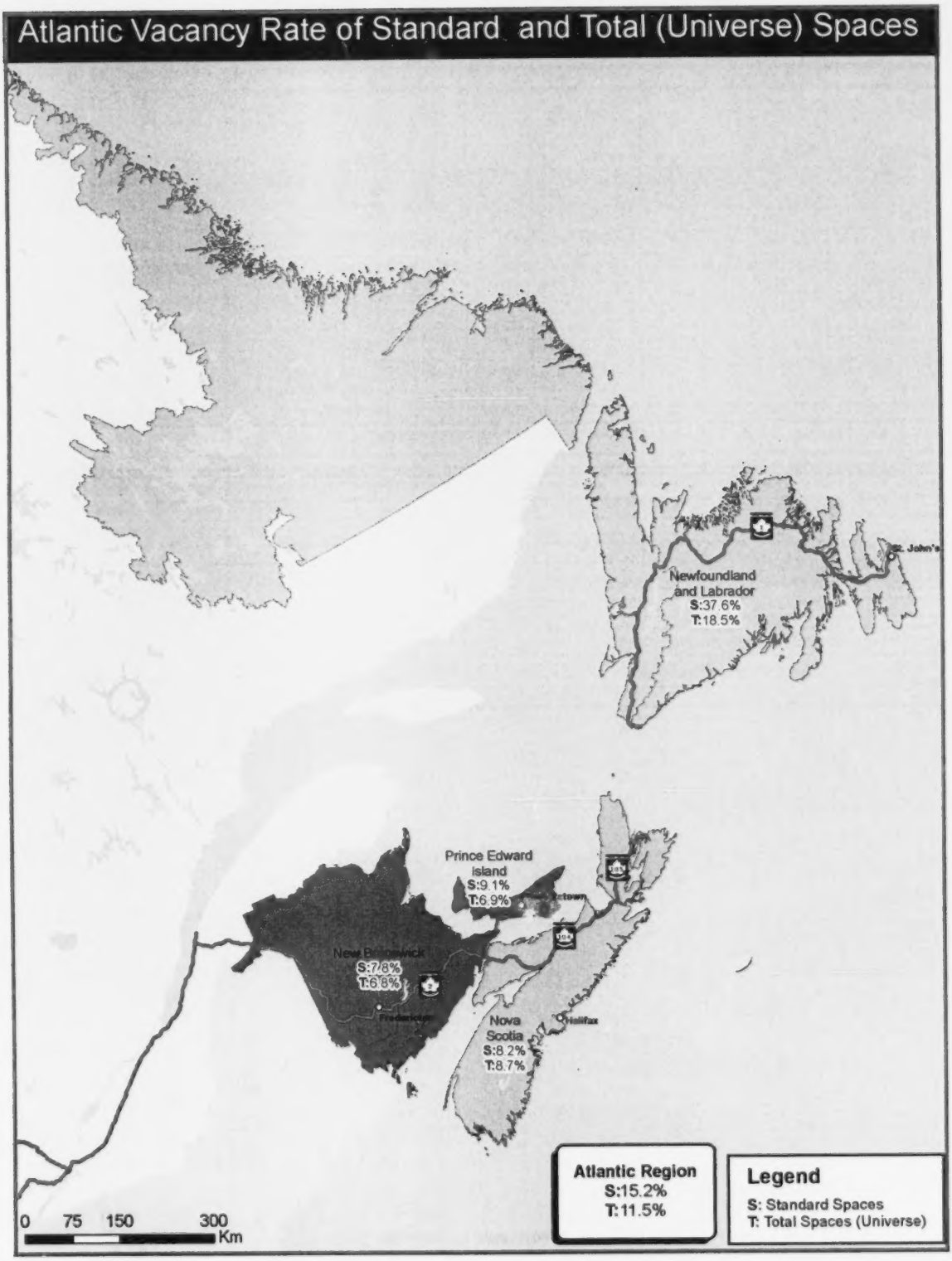

Atlantic Vacancy Rate of Standard and Total (Universe) Spaces
Newfoundland and Labrador
S:37.6%
T:18.5%
St. John's
Prince Edward Island
S:9.1%
T:6.9%
New Brunswick
S:7.8%
T:6.8%
Fredericton
Nova Scotia
S:8.2%
T:8.7%
Halifax
0 75 150 300
Km
Atlantic Region
S:15.2%
T:11.5%
Legend
S: Standard Spaces
T: Total Spaces (Universe)

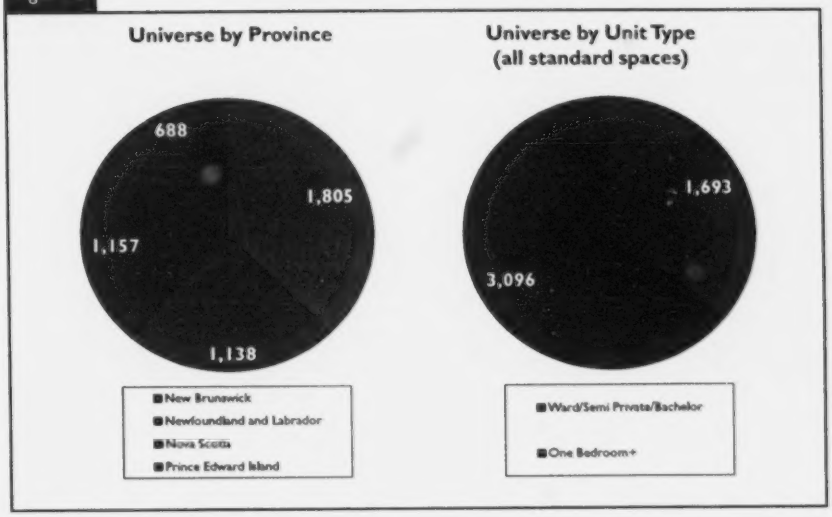
Introduction

The National Senior's Housing Survey is an annual survey conducted by Canada Mortgage and Housing Corporation. In Atlantic Canada, the 2011 survey included 164 structures that fit the established criteria and where management was willing to participate in the survey. These 164 structures contained 7,124 spaces.

There are three criteria for the survey. First, the majority of the residents in the facility must be 65 years of age or older. Second, the residence must offer an on-site meal plan. The survey, however, excluded facilities in which heavy care (heavy care is 1.5 hours of care or more per day) was mandatory. For this reason, nursing homes and long term care facilities were not included in the survey. Third, residences must contain at least ten units.

A standard space is a space that is occupied by a resident who receives a standard level of care (as opposed to heavy care) of less than 1.5 hours per day. A non-standard space includes spaces that provide heavy care, spaces offering respite (temporary/short term) accommodation and spaces that offer below market rents or subsidized rents.

Figure 2



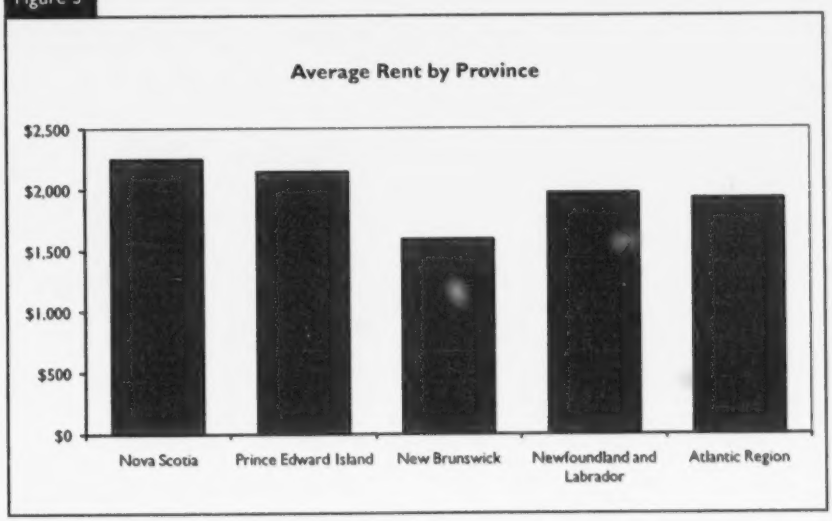
Source: CMHC

New Brunswick Records Lowest Vacancy Rate

The overall vacancy rate for standard spaces in retirement homes across Atlantic Canada was 15.2 per cent in 2011, up from last year's rate of 10.7 per cent. The only province to report a year-over-year decline was Nova Scotia, where the vacancy rate declined to 8.2 per cent from 15 per cent last year. New Brunswick recorded the lowest vacancy rate at 7.8 per cent. In Prince Edward Island the vacancy rate increased from 7.1 per cent in 2010 to 9.1 per cent this year. The highest vacancy rate was recorded in Newfoundland and Labrador at 37.6 per cent, a sharp increase from last year's rate of 18.1 per cent.

On a regional basis, one and two-bedroom unit types each recorded declines in the vacancy rate compared to last year. The vacancy rate for one-bedroom units declined from 10.6 per cent in 2010 to 9.8 per cent this year while the vacancy rate for two-bedroom units decreased from 9.6 per cent to 2.8 per cent in 2011. The vacancy rate in bachelor units in Atlantic Canada stood at 7.4 per cent this year; an increase from last year's

Figure 3



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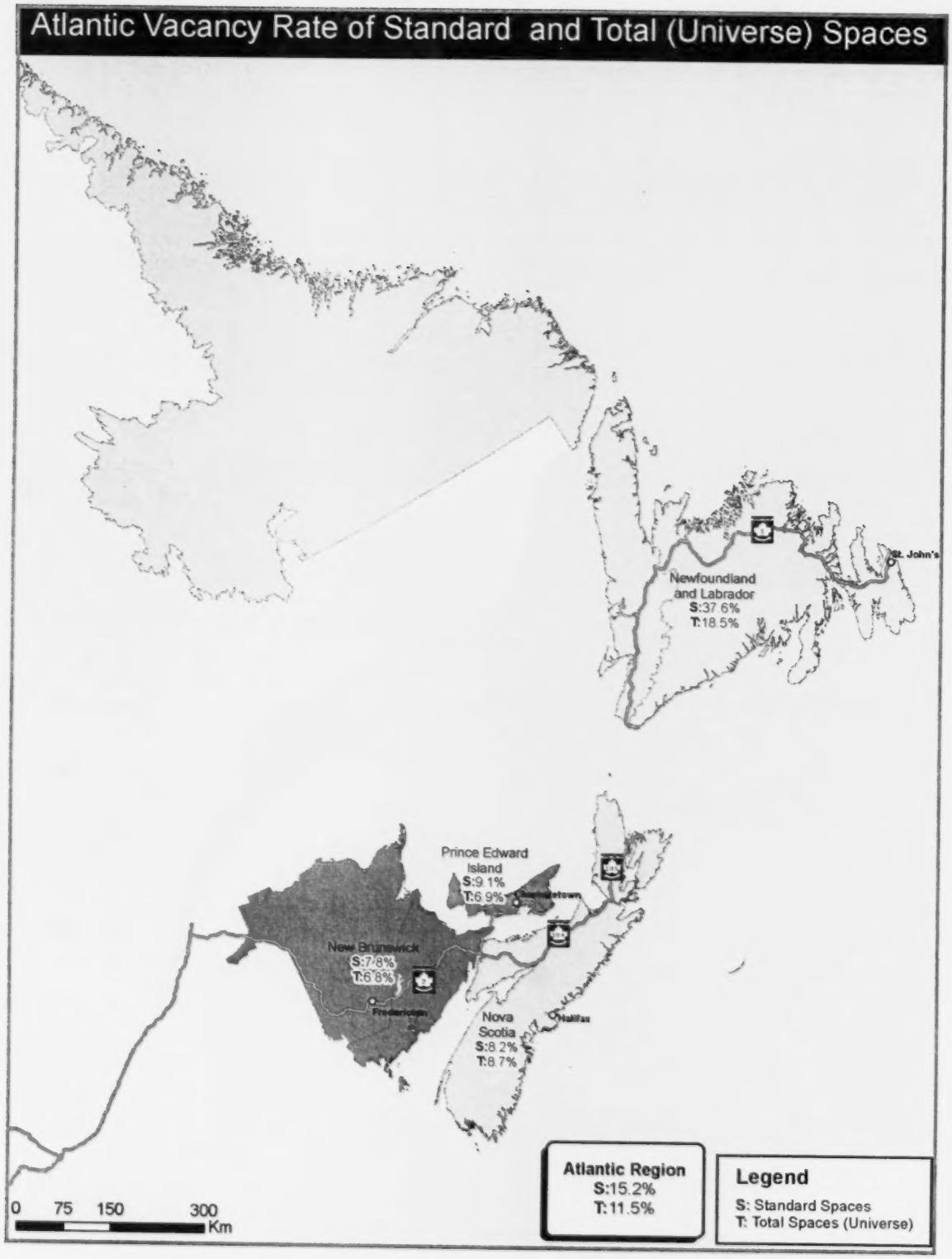
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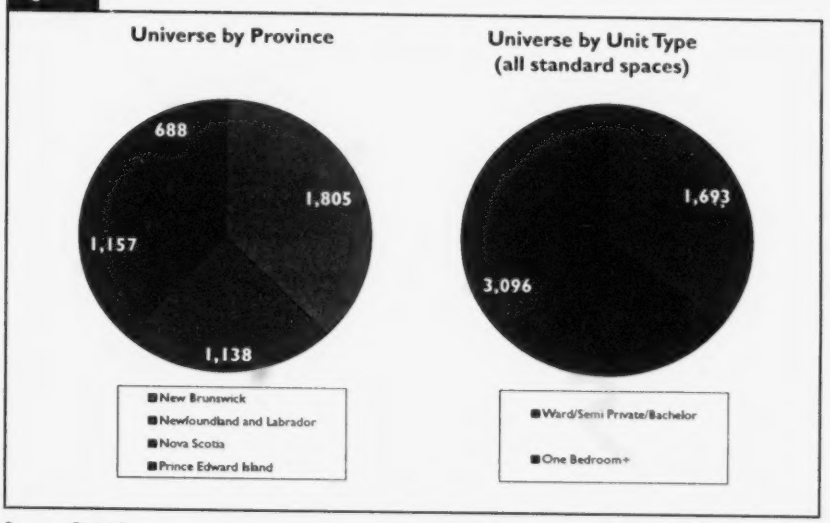

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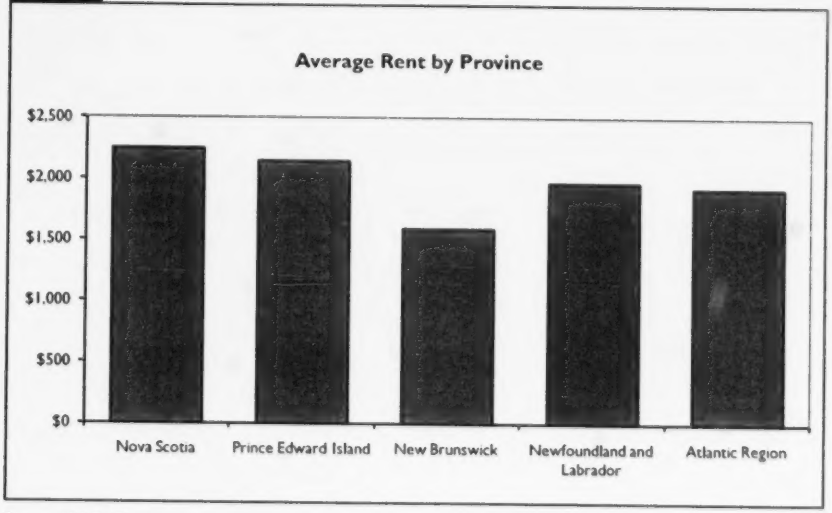
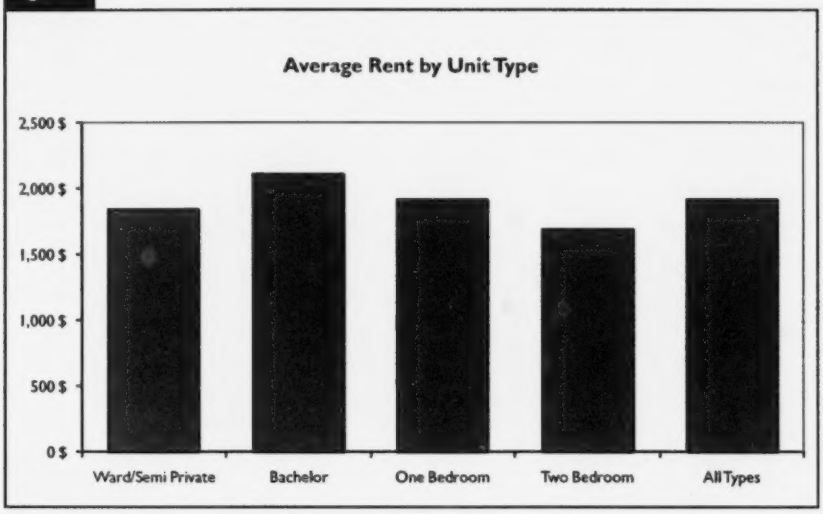


Source: CMHC

rate of 6.1 per cent. In the ward and semi-private unit type, vacancy rates posted large increases from 23 per cent in 2010 to 48.6 per cent this year. The increase was driven by a substantial change in Newfoundland and Labrador where vacancy rates rose from 33.5 per cent last year to 69.7 per cent in 2011. Ward and semi-private spaces continue to be a less popular alternative than bachelor, one and two-bedroom unit types. As a result, the vacancy rate for these types of units is higher than other unit types.

In terms of vacancy rates as they relate to rent ranges, the results in 2011 were mixed. Spaces renting between $2,000 and $2,499 reported the lowest vacancy rate this year at four per cent. Spaces renting for less than $1,500 recorded a vacancy rate of 5.9 per cent, a significant decline from the 17.3 per cent recorded in 2010. The $1,500 to $1,999 rent range had a vacancy rate of 31 per cent (up from 14.5 per cent last year) while the most expensive units surveyed (those renting for more than $2,500) recorded a vacancy rate of 11.6 per cent this year compared to 7.4 per cent last year.

Figure 4

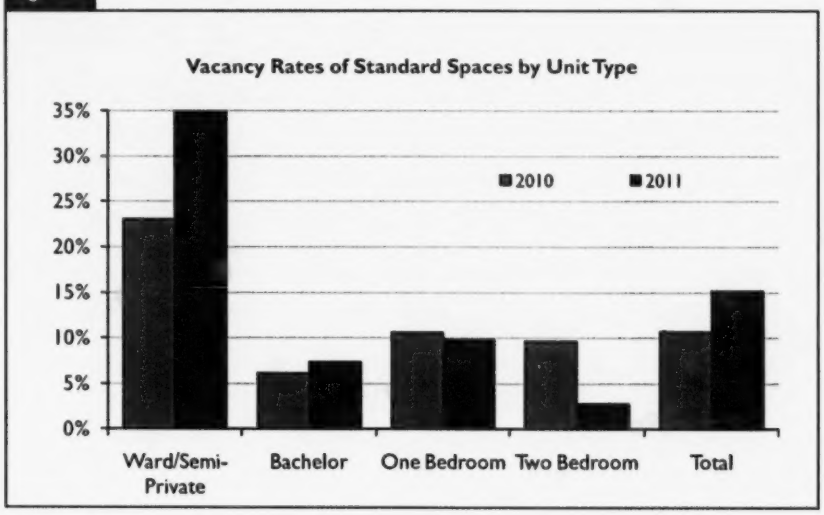


Source: CMHC

New Brunswick Continues to Record the Largest Number of Spaces

There were 164 retirement home structures surveyed in the Atlantic Region in 2011 containing a total of 7,124 spaces and housing 6,558 residents. Of these spaces, approximately, 73 per cent or 4,788 were standard spaces. CMHC was able to collect data on almost all of the standard spaces (4,767 of 4,788). The province with the largest number of standard spaces that reported information in 2011 was New Brunswick with 1,784 spaces, representing nearly 37 per cent of all total spaces within Atlantic Canada. Nova Scotia reported a percentage share of 24 per cent and Newfoundland and Labrador and Prince Edward Island recorded percentage shares of 24 and 14 per cent, respectively.

Figure 5



Source: CMHC

One-bedroom units are the most common type of standard space, with 65 per cent of the total retirement homes stock. Ward/semi-private and bachelor units comprise the remaining 35 per cent.

In terms of average rent, nearly 43 per cent of all standard spaces surveyed in Atlantic Canada rent for less than $1,850 per month. Seventeen per cent of spaces rent for between $1,850 and $2,099

and 40 per cent rent for more than $2,100.

The vast majority (89.4 per cent) of standard spaces in Atlantic Canada offered three meals per day, which were included in the reported rent. Seventy-six per cent of spaces offered 24-hour call bell service while 39 per cent included on-site medical services. An onsite, registered nurse service was offered at 27 per cent of spaces in Atlantic Canada.

Average Rents Highest in Nova Scotia

The average rent for a standard retirement home space in Atlantic Canada was $1,921 in 2011. The highest average rent was recorded in Nova Scotia at $2,251. In Prince Edward Island and Newfoundland and Labrador, the average rents were $2,142 and $1,967, respectively. The lowest average rent was recorded in New Brunswick at $1,593.

In terms of unit type, bachelor-style units captured the highest rents in 2011 at $2,108. One-bedroom units recorded the second highest average rent of $1,918. The average rent for a two-bedroom unit in Atlantic Canada was $1,694 this year while ward/semi-private units captured an average rent of $1,841.

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Newfoundland and Labrador	33.5	69.7	--	**	12.5	13.3	**	--	18.1	37.6
Prince Edward Island	10.8	15.0	5.9	5.5	++	++	--	--	7.1	9.1
Nova Scotia	38.1	**	8.6	9.4	17.7	10.2	16.2	2.1	15.0	8.2
New Brunswick	++	**	5.1	8.2	6.2	8.3	++	3.7	6.2	7.8
Atlantic Region	**23.0**	**48.6**	**6.1**	**7.4**	**10.6**	**9.8**	**9.6**	**2.8**	**10.7**	**15.2**

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Atlantic Region

Province	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Newfoundland and Labrador	**	**	22.5	51.0	14.2	2.2	8.5	13.2	18.3	37.6
Prince Edward Island	--	**	7.0	12.6	1.6	++	**	4.1	5.7	9.1
Nova Scotia	19.6	5.9	14.7	10.7	10.5	6.3	16.1	8.7	14.3	8.2
New Brunswick	14.4	5.0	**	3.6	5.9	4.9	++	18.5	5.9	7.8
Atlantic Region	**17.3**	**5.9**	**14.5**	**31.0**	**7.4**	**4.0**	**7.4**	**11.6**	**10.3**	**15.2**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Atlantic Region

Province	Total Number of Spaces	Overall Vacancy Rate		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2010	2011				
Newfoundland and Labrador	2,623	16.9 a	18.5 a	56	2,158 b	33,500	6.4
Avalon Region	1,096	18.1 a	15.5 a	23	941 b		
Central & Eastern Region	874	16.0 a	19.2 a	19	713 b		
Labrador & Western Region	653	16.4 a	22.7 a	14	505 c		
Prince Edward Island	980	6.6 a	6.9 b	25	927 c	9,700	9.6
Kings & Prince County	389	10.1 a	11.4 c	10	354 d		
Queens	591	4.3 a	4.0 c	15	573 d		
Nova Scotia	1,447	15.2 a	8.7 a	47	1,431 a	68,100	2.1
Halifax	569	4.5 a	5.6 a	15	571 a		
Northern NS & Cape Breton	322	10.1 a	12.3 c	11	290 d		
Southern NS & Annapolis Valley	556	29.6 a	9.8 a	21	569 a		
New Brunswick	2,074	5.6 b	6.8 a	36	++	54,000	++
Northwest, Northeast & Central Region	495	8.6 a	8.7 a	12	476 a		
Southwest & Southeast Region	1,579	4.6 c	6.3 a	24	++		
Atlantic Region	**7,124**	**11.8 a**	**11.5 a**	**164**	**6,558 b**	**165,300**	**4.0**

[1] Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom +	Total
Newfoundland and Labrador	503	634	1,138
Prince Edward Island	612	77	688
Nova Scotia	208	949	1,157
New Brunswick	369	1,436	1,805
Atlantic Region	**1,693**	**3,096**	**4,788**

2.3 Universe of Standard Spaces and Rent Range ($)
Atlantic Region

Province	Less than $1,850	$1,850 - $2,099	$2,100 +	Total spaces where rents are known
	% of Total[1]	% of Total[1]	% of Total[1]	
Newfoundland and Labrador	57.8	18.0	24.2	1,138
Prince Edward Island	**	**	30.1	688
Nova Scotia	35.0	3.3	61.6	1,157
New Brunswick	54.1	5.9	40.0	1,784
Atlantic Region	**42.9**	**17.0**	**40.0**	**4,767**

[1] % is based on those spaces where the rent is known.

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size Atlantic Region

Province	Meals				On-Site Medical Services	Registered Nurse onsite	24-hour call bell
	Optional	# included in rent					
		1	2	3			
Newfoundland and Labrador	**0.0 b**	**0.0 b**	**0.0 b**	**100.0 a**	**++**	**10.0 c**	**53.9 a**
10 - 49	0.0 b	0.0 b	0.0 b	100.0 a	0.0 b	13.0 d	45.0 a
50 - 89	0.0 c	0.0 c	0.0 c	100.0 a	++	0.0 c	83.4 a
90 or more	--	--	--	--	--	--	--
Prince Edward Island	**0.0 c**	**0.0 c**	**0.0 c**	**100.0 a**	**90.4 a**	**++**	**100.0 a**
10 - 49	0.0 c	0.0 c	0.0 c	100.0 a	90.4 a	++	100.0 a
50 - 89	--	--	--	--	--	--	--
90 or more	--	--	--	--	--	--	--
Nova Scotia	**++**	**13.8 c**	**13.3 c**	**70.4 a**	**61.0 a**	**++**	**83.7 a**
10 - 49	3.0 c	9.0 c	5.7 d	82.4 a	57.2 a	29.3 d	79.7 a
50 - 89	**	**	**	**	**	**	**
90 or more	++	++	++	++	++	++	100.0 a
New Brunswick	**5.6 a**	**0.0 b**	**++**	**90.5 a**	**++**	**++**	**85.0 a**
10 - 49	4.2 b	0.0 c	0.0 c	95.8 a	++	++	87.4 a
50 - 89	++	++	++	++	++	++	++
90 or more	++	++	++	100.0 a	++	++	100.0 a
Atlantic Region	**1.9 b**	**4.0 b**	**4.7 c**	**89.4 a**	**39.3 a**	**27.0 a**	**76.3 a**
10 - 49	1.6 c	2.6 b	1.7 c	94.1 a	40.8 a	27.7 a	73.5 a
50 - 89	4.3 b	4.8 d	++	72.2 a	26.1 d	21.3 d	80.6 a
90 or more	++	++	++	++	++	++	100.0 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size Atlantic Region

Province	Pharmacy	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	**0.0**	**81.9**	**0.0**	**++**	**++**	**9.9**	**22.9**
10 - 49	0.0	84.1	0.0	++	++	7.6	27.5
50 - 89	0.0	74.7	0.0	0.0	0.0	++	7.7
90 or more	--	--	--	--	--	--	--
Prince Edward Island	**0.0**	**91.2**	**0.0**	**0.0**	**++**	**++**	**++**
10 - 49	0.0	91.2	0.0	0.0	++	++	++
50 - 89	--	--	--	--	--	--	--
90 or more	--	--	--	--	--	--	--
Nova Scotia	**15.9**	**60.6**	**0.0**	**12.0**	**9.1**	**++**	**77.4**
10 - 49	++	53.8	0.0	++	++	++	71.8
50 - 89	**	**	**	**	**	**	**
90 or more	++	100.0	++	++	++	++	100.0
New Brunswick	**++**	**++**	**5.6**	**++**	**++**	**++**	**++**
10 - 49	++	++	0.0	0.0	++	++	++
50 - 89	++	++	++	++	81.5	81.5	81.5
90 or more	++	100.0	14.6	++	++	100.0	100.0
Atlantic Region	**9.0**	**72.5**	**1.2**	**6.2**	**18.9**	**27.8**	**52.4**
10 - 49	6.9	72.0	0.0	5.3	16.3	19.3	49.6
50 - 89	4.3	62.4	4.3	4.3	++	++	++
90 or more	++	100.0	9.1	++	++	89.8	100.0

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3.1 Average Rent ($) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011
Newfoundland and Labrador	1,619 a	1,708 a	--	**	2,115 a	2,134 a	**	--	2,042 a	1,967 a
Prince Edward Island	1,914 a	2,047 a	2,326 a	2,154 a	2,100 a	2,437 b	--	--	2,181 a	2,142 a
Nova Scotia	**	**	2,066 a	2,263 a	2,527 a	2,436 a	3,110 a	1,728	2,412 a	2,251 a
New Brunswick	**	**	2,131 a	1,918 a	2,296 a	1,491 a	2,775 b	1,639 a	2,275 a	1,593 a
Atlantic Region	**1,811 a**	**1,841 a**	**2,187 a**	**2,108 a**	**2,288 a**	**1,918 a**	**2,875 a**	**1,694 a**	**2,232 a**	**1,921 a**

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became National in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2011 Survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e. before January 2010
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C).
- ✓ Offer an onsite meal plan
- ✓ Does not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ And at least 50% of resident's are 65 years of age or older

The Seniors' Housing Survey is a census and not a sample survey therefore all senior's residences in Canada meeting these criteria are included to be part of this survey. Survey data were obtained through a combination of telephone interviews and fax and email responses.

Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. 2010 data in this publication may differ from what was published last year, due to survey zone changes in 2011. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one-half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semiprivate and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space occupied by a resident who does not receive a high level of care (i.e. the resident receives less than 1.5 hours of care per day.) Regional terms for this type of space vary across the country. In cases where there is no additional charge paid for a high level of care, the estimate of the number of standard spaces may include units where the resident receives a high level of care.

Heavy Care Space: A space where the residence provides 1.5 hours or more of healthcare per day to the resident. Examples include Alzheimer, Dementia and mobility support residents. Heavy care space estimates for occupied spaces may only include those where the resident is required to pay for a high level of care.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population and then expressed as a percentage

Acknowledgement

The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality

All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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